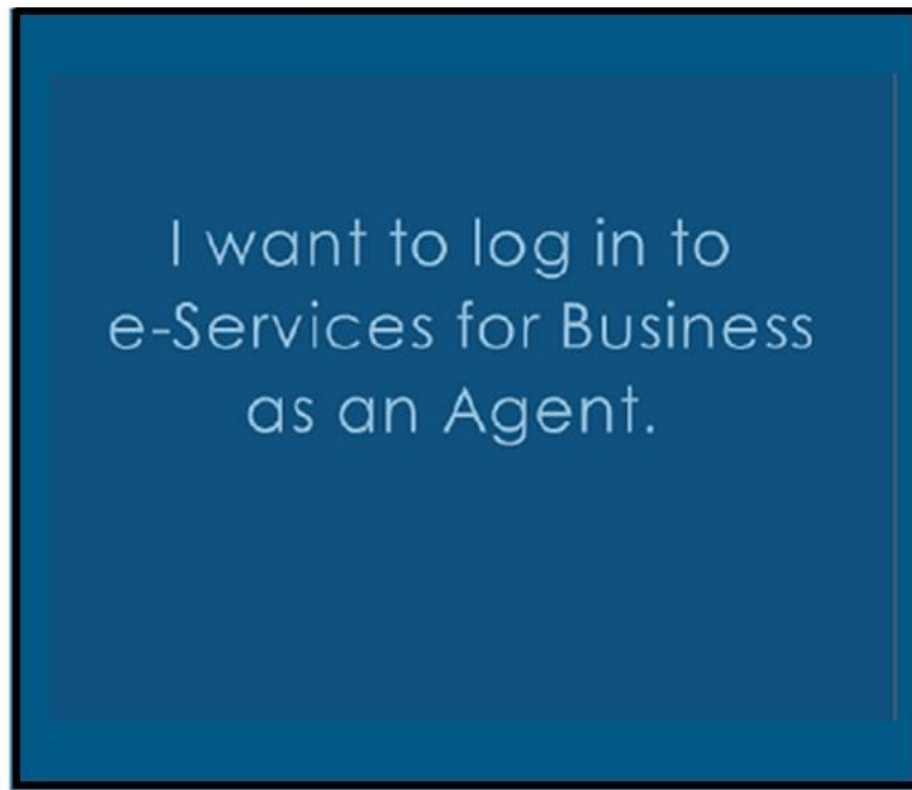# I want to log in to e-Services for Business as an Agent

Slide notes

This video is developed and presented by the California Employment Development Department (EDD) and was created to assist you with navigating e-Services for Business

This tutorial will show you how to log in to e-Services for Business as an agent and manage your clients' payroll tax accounts online. Welcome to the EDD home page. Notice all of the tabs across the top. Select the "Payroll Taxes" tab.

Payroll Taxes

Slide notes: Here on the "Payroll Taxes" tab, there are numerous links. With e-Services for Business, you will have access to account information 24 hours a day, 7 days a week, as well as the ability to file and pay California payroll taxes online.

You can access e-Services for Business by selecting one of these links.

e-Services for Business

Slide notes: Select "e-Services for Business Login."

Login

Slide notes: You should already have a username and password established. Enter your username and password and select "Login" to begin using e-Services for Business.

Authorization

Slide notes: On your first visit, you will need to complete this one-time authorization process to use e-Services for Business. Step 1. Select "Registration Type."

Slide 7

Slide notes: The two types of enrollment are either an "Agent/Employer Representative" or "Employer." Please take a moment and read this important message. Take time and find out what type of enrollment you want to utilize, this is a detailed explanation of the two choices.

In this example, we are going to choose "Agent/Employer Representative."

Slide 8

Slide notes: You have a choice of Social Security Number (SSN) or Federal Employer Identification Number (FEIN). If you are currently a business with a FEIN, you may select it.

If you are an individual, you may select Social Security Number. For this example, we select "Social Security Number."

Slide 9

Slide notes: Complete this field with the ZIP Code that is related to the FEIN or SSN that you entered. When all fields are completed, select "OK" to continue.

Slide 10
Slide notes: Step 2. Select "Agent Information."

Slide 11

Slide notes: Complete this page with your own information, not your clients. When the information is completed. Select, "OK."

Slide 12
Slide notes: Now we are ready to submit this request. Select "Submit."

Slide 13

Slide notes: Are you sure you want to submit the request? Select "OK."

Slide 14

Slide notes: Here is the confirmation number that your registration request is being processed. Select, "OK" to continue.

Add Access to Another Account

Slide notes: Here we are at the "My Accounts" screen, this screen shows you a summary of your enrollment information. The summary section displays your profile details including taxpayer names and addresses.

Now we have options, select the hyperlinks in this section to navigate to windows that allow you to perform the stated action. Select "Add Access to Another Account," from the "I Want To ..." section in order to gain access to your client's account.

These steps would need to be repeated to gain access for each client account number.

Slide 16

Slide notes: Select "Account Type." For this example we select "Employment Tax."

Slide 17

Slide notes: Choose an additional question to answer. We chose "Total Subject Wage Reported."

Slide 18
Slide notes: Select "Submit" to continue.

Slide 19

Slide notes: The request to add access to another account has been submitted and will be processed. Select "OK" to continue.

My Accounts

Slide notes: As you can see we added access to a second account. This is the my accounts screen. Before we go any further, selecting help will open a separate window to view assistance. The "Help" link is available here on every page.
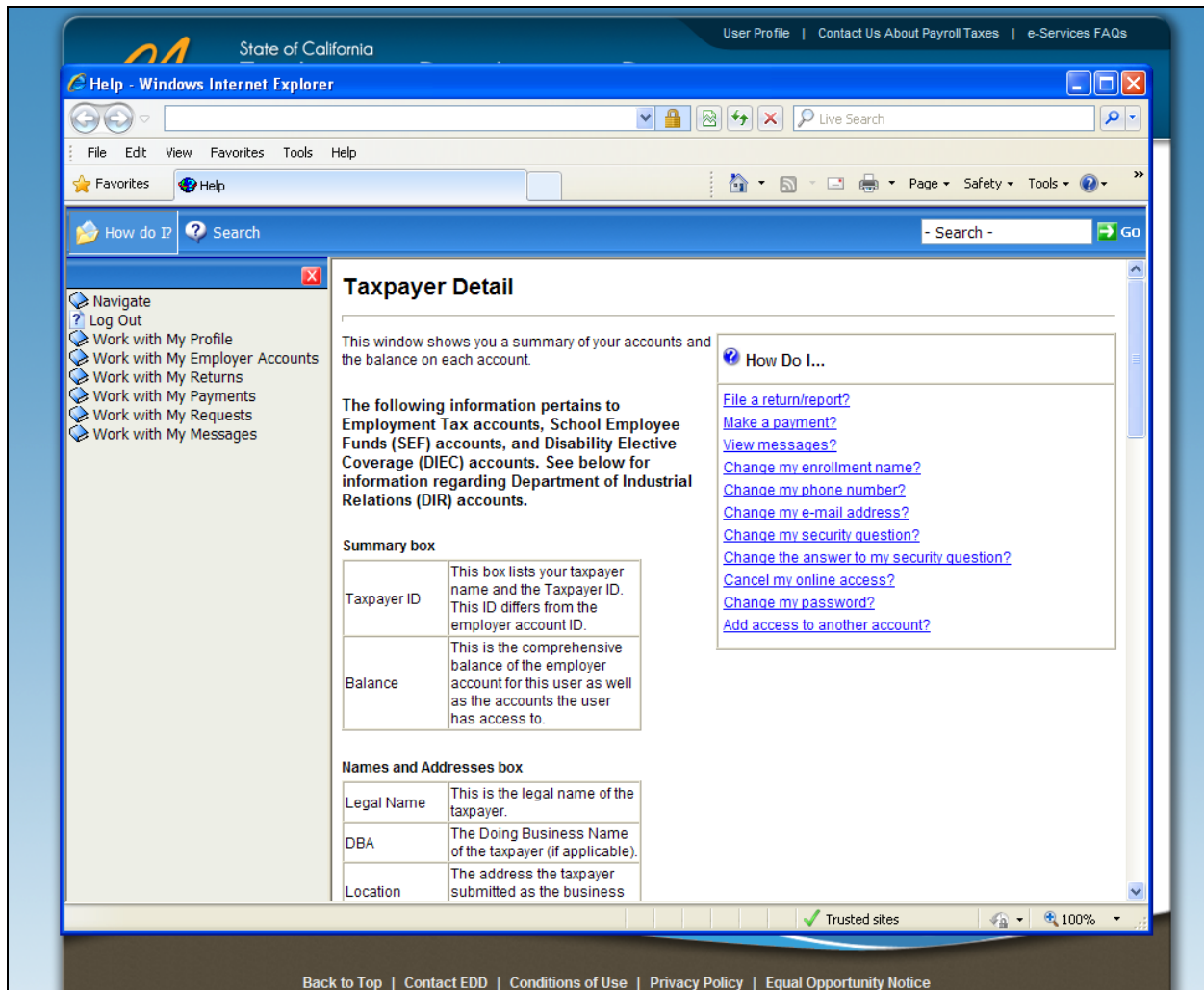
Help

Slide notes: Here on the "Help" screen, you can find assistance to help you navigate through our system. This section lists the tasks you might need to manage your payroll tax account online. The help displayed is in relation to the screen you are currently on. Please close the window when finished.

Slide 22

Slide notes: Now we are going to view "My Profile." This is where the payroll agent or representative can add, edit, and delete bank information.

Slide 23
Slide notes: From here we are going to select "Other Accounts."

Add Payment Source

Slide notes: Then we are going to select "Shared Payment Sources."

Slide 25
Slide notes: From here you select "Add."

Slide 26

Slide notes: Enter a source name for the shared bank account. For this example we are going to name it "My EDD Shared Agent Bank Account." In the "Payment Source" window, "Bank Account Type" is a choice between "Checking" or "Savings."

Slide 27

Slide notes: Then enter the correct routing number, account number, and then confirm the account number. When completed, select "Save."

Slide 28

Slide notes: Notice that we can see the bank account information now. Select "Home" to continue.

Bulk Rate Inquiry

Slide notes: To save time we added access to another client account. Now we are going to select "Submit Bulk Rate Inquiry."

Slide 30
Slide notes: Select the "CSV Instructions" link.

Slide 31

Slide notes: Here are the instructions provided to import a CSV file from your computer. When you are finished viewing, select "OK" to continue.

Slide 32
Slide notes: Step 1. Select "Import File of Account IDs."

Slide 33
Slide notes: Select "Browse" for the file you want to import.

Slide 34

Slide notes: Choose the correct file to import, and then select "Open" to import the attachment.

Slide 35
Slide notes: Now you can see the file. Select "Import" to complete your inquiry.

Slide 36

Slide notes: For this example we will choose "2013." If the EDD has Unemployment Insurance information for future years the option will be available to you. Select "Process Request" to continue.

Slide 37
Slide notes: Select "OK" to process this request.

Slide 38

Slide notes: Here is the rate for these two account numbers. Select "Cancel" to continue.

Slide 39

Slide notes: Now we can make a payment, select "Make multiple payments."

Slide 40

Slide notes: From here you select "Other Accounts."

Slide 41
Slide notes: Select the "Add Payment" to continue.

Slide 42

Slide notes: Select the correct "Payment Period" for which you want to pay.

Slide 43
Slide notes: Enter the correct payment amount.

Slide 44

Slide notes: Notice all of the fields are populated with your bank information. For this example, we are going to use January 11, 2013, as the pay date. We choose "Quarterly" for the deposit schedule.

We enter a fifty dollar ($50.00) payment for State Disability Insurance and one hundred dollar ($100.00) payment for Personal Income Tax.
Payment total must match payment amount. Select "OK" to continue.

Make a DE 88 Payment

Slide notes: Select the "Add Payment" to continue.

Slide 46
Slide notes: Select the correct "Payment Period" for which you want to pay.

Slide 47

Slide notes: We enter a one hundred dollar ($100.00) payment for State Disability Insurance, another two hundred dollar ($200.00) payment for Personal Income Tax.

Notice all of the fields are populated with your bank information.For this example, we are going to use January 11, 2013, as the pay date. We choose "Quarterly" for the deposit schedule.
 Payment total must match payment amount. Select "OK" to continue.

Slide 48

Slide notes: Select "Payment Summary."

Slide 49

Slide notes: Select "Submit Payments."

Slide 50

Slide notes: This is your approval and authorization for the Employment Development Department to debit your bank account in the amount of four hundred fifty dollars ($450.00). Selecting "OK" will act as your electronic signature.

Slide 51

Slide notes: This is a confirmation page telling you that your payments have been submitted. Select "OK" to return to the "My Accounts" page.

Slide 52
Slide notes: Next we are going to select Little Jane's account number.

Make a Period Payment
Slide notes: Now we are going to select "Pay" to make the payment.

Slide 54

Slide notes: Select a payment method. You have a choice between an ACH Debit (EFT) or a credit card. For this example, we select "ACH Debit (EFT)."
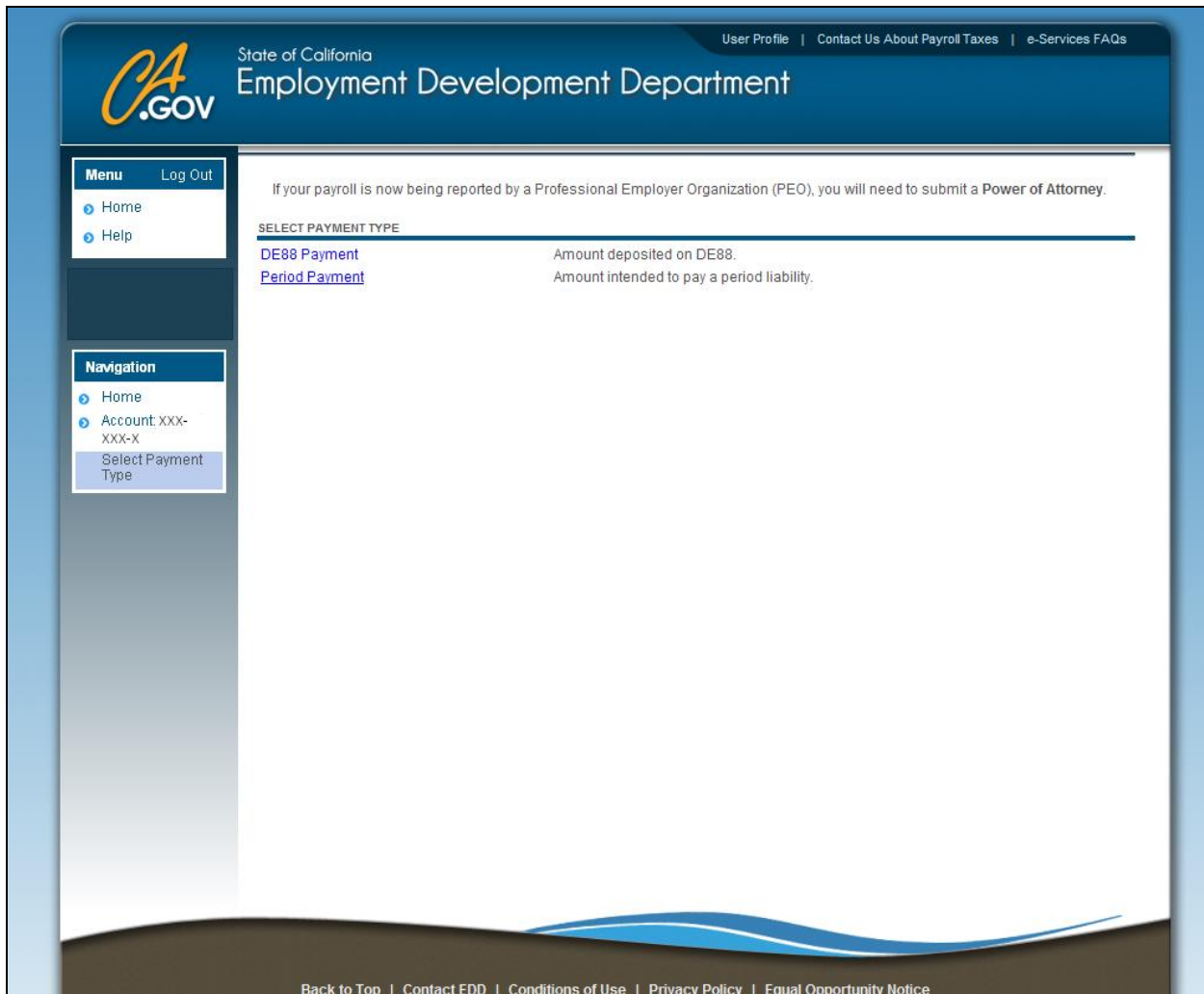
Slide 55
Slide notes: From this screen select "Period Payment."

Slide 56

Slide notes: Choose "My EDD Shared Agent Bank Account" to make your period payment. Once you select the link all of the bank information will be pre-populated for you.

We would like to make a five thousand dollar ($5000.00) payment on our account today, so we are going to change the amount due to five thousand dollars ($5000.00). Select "Submit" to continue.

Slide 57

Slide notes: This is your approval and authorization for the Employment Development Department to debit your bank account in the amount of five thousand dollars ($5000.00). Selecting "OK" will act as your electronic signature.

Slide 58

Slide notes: Here is the confirmation page that the period payment for five thousand dollars ($5000.00) was submitted. Select "OK" to continue.

Slide 59
Slide notes: From here select "Home."

Attach a Bulk Payment

Slide notes: Next we are going to "Attach a Bulk Payment File."

Slide 61
Slide notes: Select "Instructions."

Slide 62
Slide notes: Select the "CSV Instructions" link.

CSV File Format

Open a Microsoft Excel, Microsoft Word, or Microsoft Notepad document and enter the data according to the field position layout in the table below:

Field Name	Length	Format	Position (Column)
Employer Account Number	8	Numeric	1
Pay Date (Payroll Date)	8	MMDDYYYY	2
Bank Debit Date	8	MMDDYYYY	3

Deposit Schedule:
  M: Monthly
  N: Next Banking Day
  Q: Quarterly
  S: Semi-weekly
	1	Alpha – Must be one of (M, N, Q, S)	4

Bank Routing Number	9	Numeric	5
Bank Account Number	n/a	Numeric	6

Bank Account Type
  C: Checking
  S: Savings
	1	C or S	7

UI Amount	n/a	Dollar Amounts = 9.00 Zero Dollar Amounts = 0.00 or 0	8
ETT Amount	n/a	Dollar Amounts = 9.00 Zero Dollar Amounts = 0.00 or 0	9
SDI Amount	n/a	Dollar Amounts = 9.00 Zero Dollar Amounts = 0.00 or 0	10
PIT Amount	n/a	Dollar Amounts = 9.00 Zero Dollar Amounts = 0.00 or 0	11
Penalty Amount	n/a	Dollar Amounts = 9.00 Zero Dollar Amounts = 0.00 or 0	12
Interest Amount	n/a	Dollar Amounts = 9.00 Zero Dollar Amounts = 0.00 or 0	13

Important

All the tax payment fields and columns must be filled. Dollar amounts (except for zero dollar amounts) must include a decimal point. For example:
- Dollar amounts must be formatted as: 52.00.
- Zero dollar amounts can be formatted as: 0.00 or 0
Note: To keep leading zeros visible in Microsoft Excel, you will need to format the cell as Text or Custom

If the payment file is created in:
- Microsoft Excel, save the file in a CSV type format, .csv (Comma delimited)(*.csv)
- Microsoft Word or Notepad, save the file in plain text format (*.txt), then rename the type to *.csv

Sample CSV File Layouts

Sample 1: Using decimal points
12345678,12302010,12312010,M,121000358,12345,C,50.00,0.00,15.15,100.88,0.00,0.00

Sample 2: Using no decimals for zero dollar amounts
12345678,12302010,12312010,M,121000358,12345,C,50.00,0,15.15,100.88,0,0

e-Services FAQs

Cancel

Cancel

OK   Cancel

Slide 63

Slide notes: Here are the instructions provided to import a CSV file from your computer. When you are finished viewing, select "OK" to continue.

Slide 64

Slide notes: Step 1. Select "Add Attachment."

Slide 65

Slide notes: There is a choice between DE 88 CSV, or DE 88 XML ZIP.

Slide 66

Slide notes: Fill in the description with a name that you can recognize and then select "Browse" to find the file you want to import.
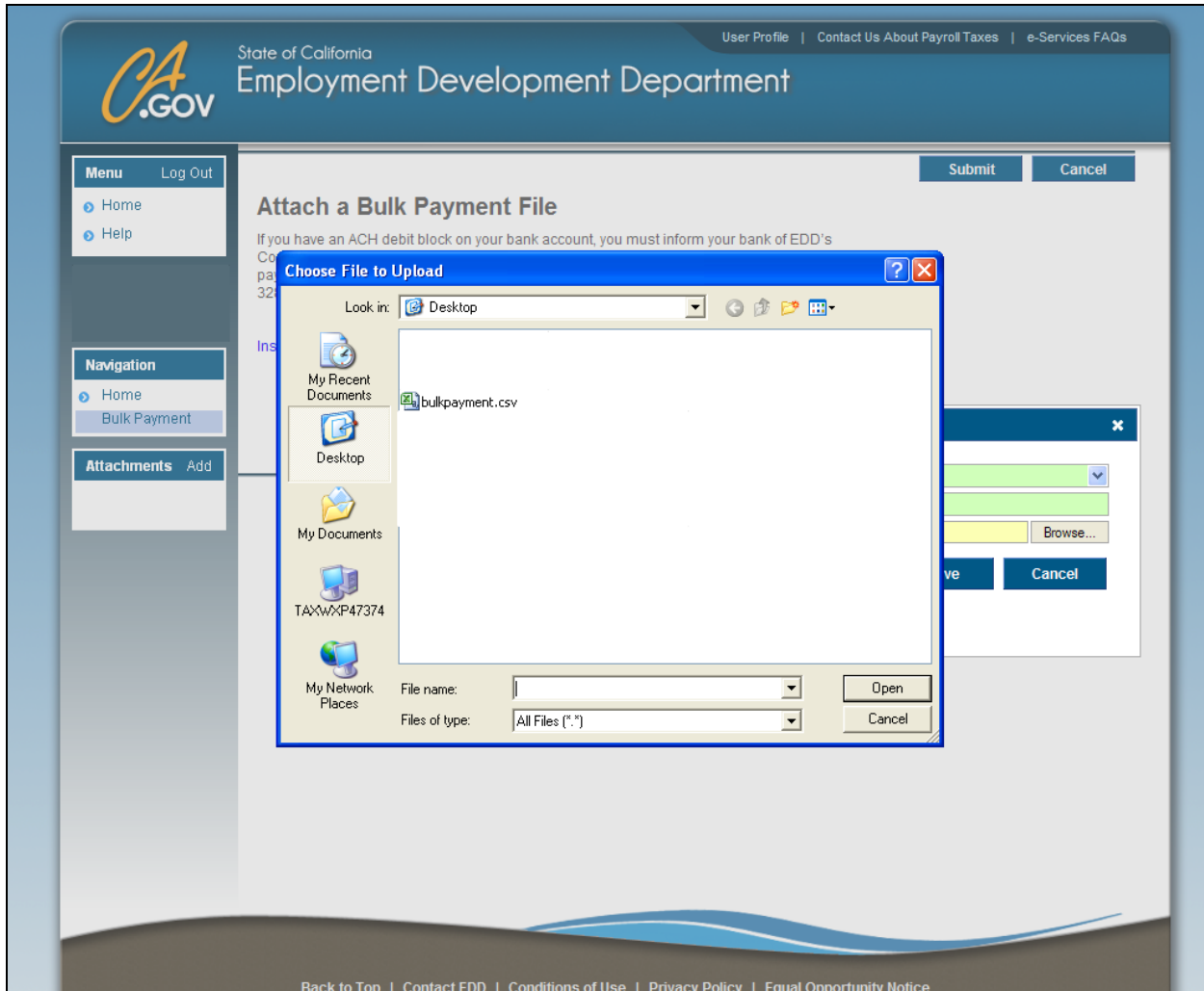
Slide 67

Slide notes: Choose the correct file to import, and then select "Open" to import the attachment.

Slide 68

Slide notes: Now you can see the attachment that has been imported, select "Save."

Slide 69

Slide notes: Step 2. Select "Add Contact Information."

Slide 70

Slide notes: Complete contact information and select "OK" to continue.

Slide 71

Slide notes: Select "Submit" to send the bulk payment file.

Slide 72
Slide notes: Are you sure you want to submit this request? Select "OK."

Slide 73

Slide notes: Here is the confirmation page, including your confirmation number. Select "OK" to continue.

Attach a Return File
Slide notes: Next we will select "Attach a Return File."

Slide 75

Slide notes: Please read these instructions for return file format and size limits. Then proceed to Step 1. Select "Attach File."

Slide 76

Slide notes: For this example we select the "DE9C, XML, ZIP."

Slide 77

Slide notes: Choose the correct file to import, and then select "Open" to import the attachment.

Slide 78
Slide notes: Now you can see the attachment that has been imported, select "Save."

Slide 79

Slide notes: Step 2. Select "File Information."

Slide 80

Slide notes: Complete with your firm information. When completed select "OK."

Slide 81

Slide notes: The declaration page is very important, this is where you declare that the information herein is true and correct to the best of your knowledge. When the information is completed, select "OK" to continue.

Slide 82
Slide notes: Now you are ready to select "Submit" and send this return file.
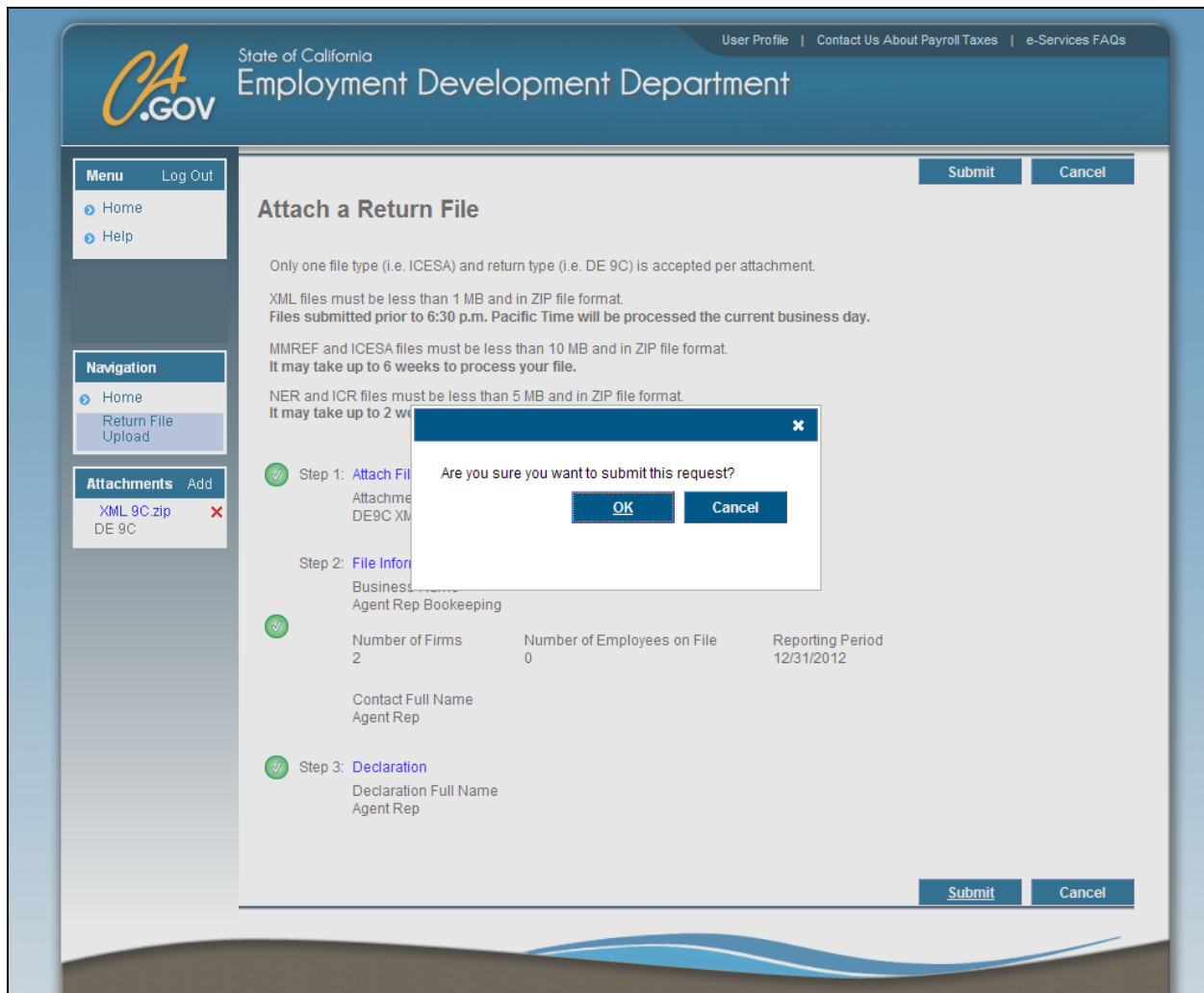
Slide 83

Slide notes: Are you sure you want to submit this request? Select "OK."
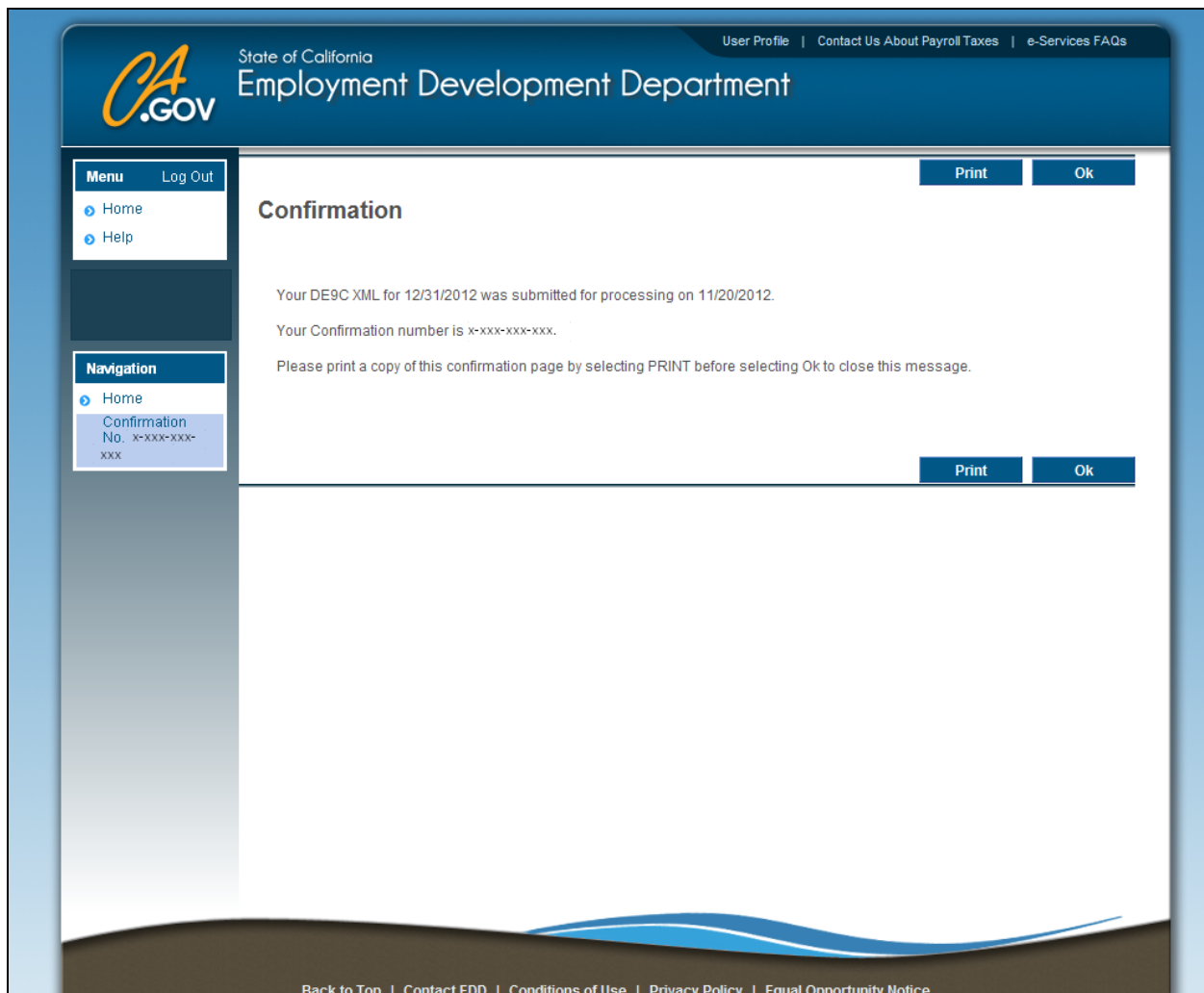
Slide 84

Slide notes: Here is the confirmation page, your DE 9C XML was submitted for processing. Select "OK" to continue.

Slide 85

Slide notes: Select the "Requests" tab and find out about the status of your return file.

Slide 86

Slide notes: Select "Accounts."

Slide 87

Slide notes: Select the "Account ID."

State of California
Employment Development Department

User Profile | Contact Us About Payroll Taxes | e-Services FAQs

Menu   Log Out
• Home
• Help

Navigation
• Home
  Account: xxx-xxxx-x

I Want To...
• Close My Business
• File a Return
• Make a Payment
• View My Payments
• Get My UI Rate
• View Prior iFile Returns
• File Report of New Employee(s)
• File Rpt. of Contractors
• Make Other Requests

Account Last Updated: 11/7/2012 2:31:04 PM

EMPLOYMENT TAX

Account ID	xxx-xxxx-x
Filing Frequency	Quarterly
Payment Source Edit	BANK OF AMERICA, N.A. - 2345
Balance	0.00
Pending Payments + Retur	-740.00
Effective Balance Pay	-740.00

NAMES AND ADDRESSES

DBA Name	Edit	
Legal Name	Edit	LITTLE JANE
Residence Address	Add	
Location Address	Edit	999 ANYSTREET ANYCITY CA 95814
Mailing Address	Add	

PERIODS   REQUESTS⁵   ACTIVITY   MESSAGES⁰   LETTERS

ATTENTION NEEDED¹   SEARCH

PERIODS FROM 07-NOV-2010   Change Date | Defaults | Filter

Period	Return Status			Tax	Penalty	Interest	Credits	Balance
31-Dec-2012	Multiple Returns	Return List	Pay	0.00	0.00	0.00	0.00	0.00
30-Sep-2012	Multiple Returns	Return List	Pay	327.32	0.00	0.00	327.32	0.00
30-Jun-2012	Multiple Returns	Return List		388.76	0.00	0.00	388.76	0.00
31-Mar-2012	Multiple Returns	Return List		0.00	0.00	0.00	0.00	0.00
31-Dec-2011	Multiple Returns	Return List		264.26	52.84	2.02	319.12	0.00
30-Sep-2011	Multiple Returns	Return List		161.52	0.00	0.00	161.52	0.00
30-Jun-2011	Multiple Returns	Return List		260.46	26.05	0.03	286.54	0.00
31-Mar-2011	Multiple Returns	Return List		507.47	0.00	0.00	507.47	0.00
31-Dec-2010	Multiple Returns			671.36	0.00	0.00	671.36	0.00

Report of New Employee(s), DE 34 (iNER)

If your payroll is now being reported by a Professional Employer Organization (PEO), you will need to select "Make Other Requests" from the I Want To... section.

Back to Top | Contact EDD | Conditions of Use | Privacy Policy | Equal Opportunity Notice

File Rpt of Ind Contractor
Slide notes: Now we will select "File a Report of Independent Contractors."
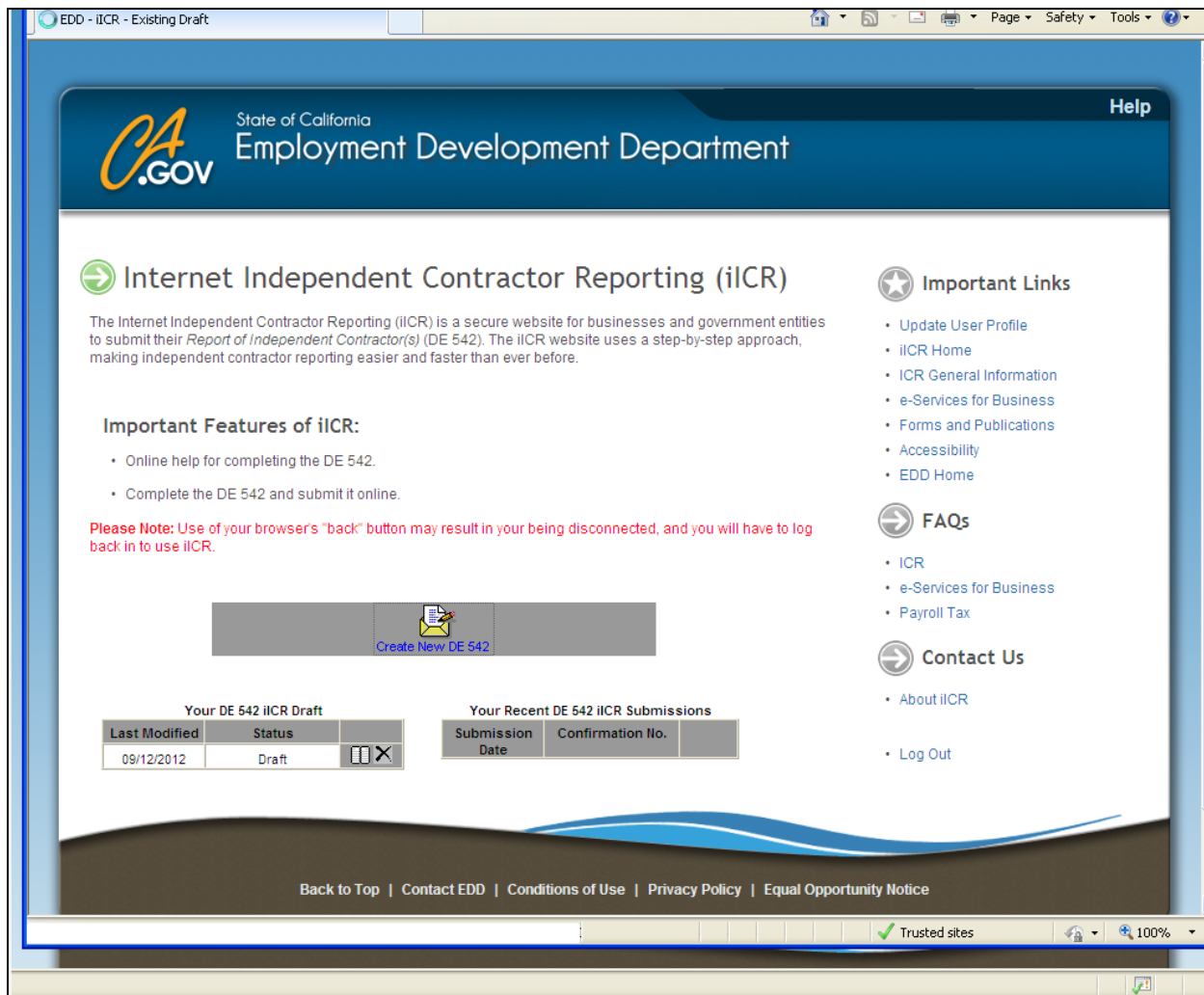
Slide 89
Slide notes: From this page you select "Create New DE 542."

Slide 90

Slide notes: Enter service recipient information here. When the information is completed select "Next."

Slide 91

Slide notes: Enter independent contractor information on this page.

Slide 92
Slide notes: At the bottom of the page, select "Submit."

Slide 93

Slide notes: Here you can see that the submission was successful. A printer friendly version is available here.

State of California
Employment Development Department

User Profile | Contact Us About Payroll Taxes | e-Services FAQs

Menu Log Out
- Home
- Help

Navigation
- Home
- Account: xxx-xxxx-x

I Want To...
- Close My Business
- File a Return
- Make a Payment
- View My Payments
- Get My UI Rate
- View Prior iFile Returns
- File Report of New Employee(s)
- File Rp[Report of New Employee(s), DE 34 (iNER)] Contractors
- Make Other Requests

Account Last Updated: 11/7/2012 2:31:04 PM

EMPLOYMENT TAX

Account ID	XXX-XXXX-X
Filing Frequency	Quarterly
Payment Source	Edit	BANK OF AMERICA, N.A. - 2345
Balance	0.00
Pending Payments + Retur	-740.00
Effective Balance	Pay	-740.00

NAMES AND ADDRESSES

DBA Name	Edit	
Legal Name	Edit	
Residence Address	Add	LITTLE JANE
Location Address	Edit	
Mailing Address	Add	999 ANYSTREET ANYCITY CA 95814

PERIODS | REQUESTS⁵ | ACTIVITY | MESSAGES⁰ | LETTERS

ATTENTION NEEDED¹ | SEARCH

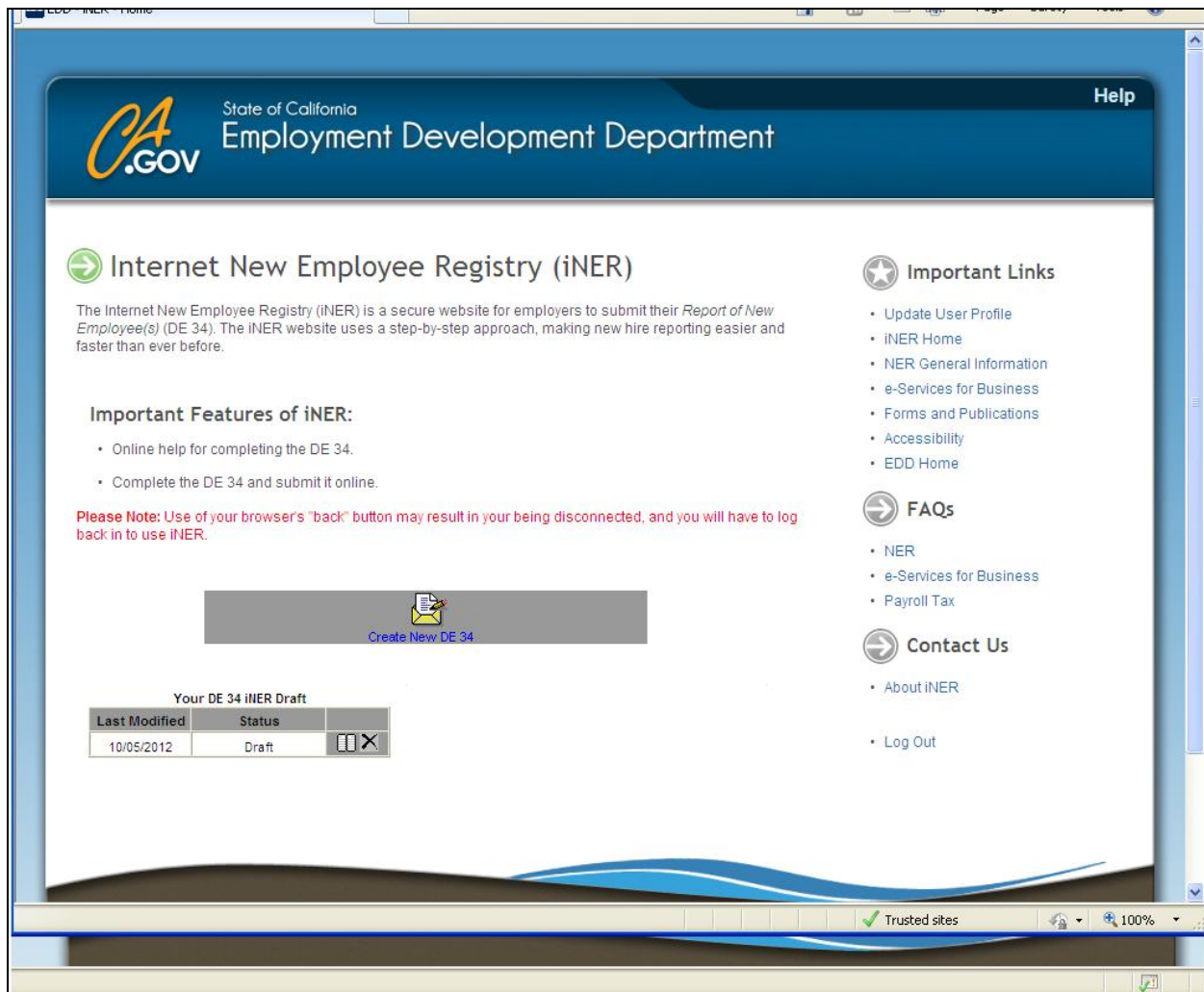**PERIODS FROM 08-NOV-2010**   Change Date | Defaults | Filter

XXX-XXXX-X

Period	Return Status			Tax	Penalty	Interest	Credits	Balance
31-Dec-2012	Multiple Returns	Return List	Pay	0.00	0.00	0.00	0.00	0.00
30-Sep-2012	Multiple Returns	Return List	Pay	327.32	0.00	0.00	327.32	0.00
30-Jun-2012	Multiple Returns	Return List		388.76	0.00	0.00	388.76	0.00
31-Mar-2012	Multiple Returns	Return List		0.00	0.00	0.00	0.00	0.00
31-Dec-2011	Multiple Returns	Return List		264.26	52.84	2.02	319.12	0.00
30-Sep-2011	Multiple Returns	Return List		161.52	0.00	0.00	161.52	0.00
30-Jun-2011	Multiple Returns	Return List		260.46	26.05	0.03	286.54	0.00
31-Mar-2011	Multiple Returns	Return List		507.47	0.00	0.00	507.47	0.00
31-Dec-2010	Multiple Returns			671.36	0.00	0.00	671.36	0.00

If your payroll is now being reported by a Professional Employer Organization (PEO), you will need to select "Make Other Requests" from the I Want To... section.

File Rpt of New Employee(s)
Slide notes: Now we are going to report newly hired employees. Select "File Report of New Employee(s)."

Slide 95

Slide notes: Select "Create New DE 34."

Slide 96

Slide notes: Enter your employer information on this page. When completed, select "Next."

Slide 97

Slide notes: Enter new employee information on this page. When completed, scroll down to the bottom of the page.

Slide 98

Slide notes: At the bottom of the page, select "Next."

Slide 99

Slide notes: The information you entered is now saved. If you need to edit or delete this information select this box. If the information is correct you can select "Submit" and send this request.

Slide 100

Slide notes: Here you can see that the submission was successful. A printer friendly version is available here. Visit our frequently asked questions for additional information.
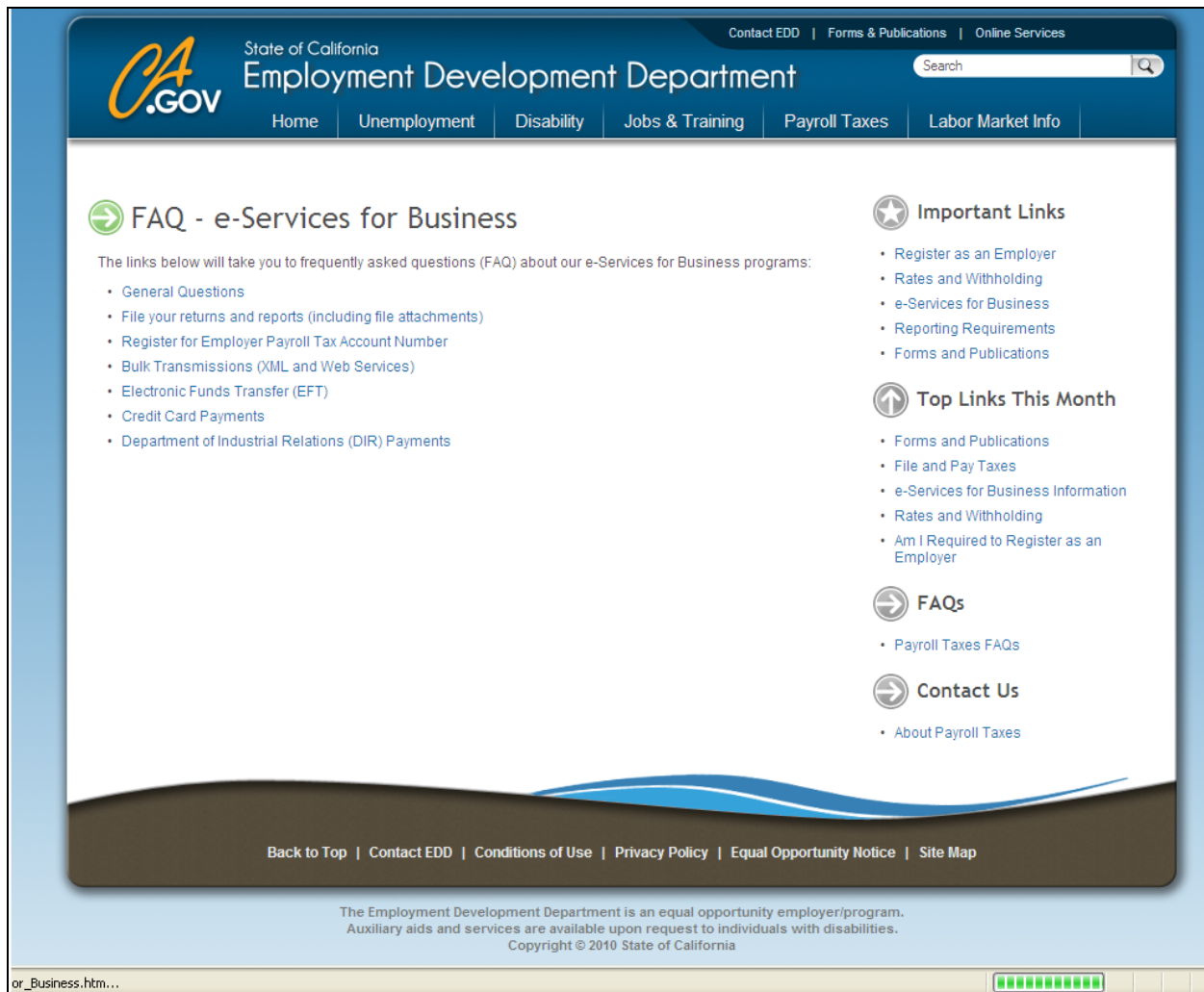
FAQs

Slide notes: These links will take you to frequently asked questions about our e-Services for Business programs.

I want to log in to e-Services for Business as an Agent

www.edd.ca.gov
Taxpayer Assistance Center
1-855-866-2657

Other resources are available at www.edd.ca.gov, or the Taxpayer Assistance Center at (855)866-2657. Thank you for watching this tutorial on how to login and use e-Services for Business as an agent.